Eurofound

European Foundation for the Improvement of Living and Working Conditions

The tripartite EU agency providing knowledge to assist in the development of better social, employment and work-related policies

Structural change, non-standard employment, and job quality

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EESC hearing on EPSR
19 November 2026

Eurofound research and areas of EPSR

Equal opportunities and access to the labour market	Fair working conditions	Social protection and inclusion
European Jobs Monitor European Restructuring Monitor **Non-standard employment** Platform work	European Working Conditions Survey Algorithmic management and AI Minimum wages Social dialogue	Monitoring social convergence Housing Care services: - Care workforce - Assessing progress in providing services for children

*https://www.eurofound.europa.eu/en/publications/all/gothenburg-porto-**upward-convergence-through-european-pillar-social-rights***

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Recent and forthcoming publications

RESEARCH REPORT

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Employment and labour markets

Non-standard employment in the EU: Trends, types and working conditions

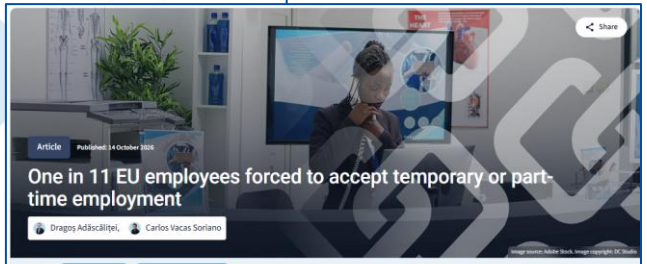


WORKING PAPER

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Employment and labour markets

Examining temporary employment in EU member states: A longitudinal perspective



The proportion of employees involuntarily on temporary and part-time contracts has declined across the EU since 2015. The rate, however, remains high in southern Europe and is increasingly concentrated in a few service sectors. The employees on these contracts are mainly women and young workers.

Introduction

Non-standard employment – meaning temporary (or fixed-term) and part-time work – is usually discussed in terms of flexibility: shorter hours for parents or fixed-term contracts that give young people a first step into work. While some of it is exactly that, a sizeable part is accepted by workers because alternatives are not available. For these workers, flexibility is not something they chose but an impediment; they are in involuntary non-standard employment.

A forthcoming Eurofound report measures this group of employees over almost two decades. Using EU Labour Force Survey microdata for 2006 to 2024, it analyses employees who hold a temporary contract because they could not find a permanent one, who work part time because they could not find a full-time job, or who have a part-time temporary job because they could not find full-time permanent employment.

In 2024, 8.8% of employees in the EU were in this position, down from 11.2% in 2006. The rate of involuntary non-standard employment peaked at 12.7% in 2015 as national labour markets were still experiencing the effects of the Great Recession. From 2015, the rate fell steadily, interrupted only briefly by the pandemic, as labour markets tightened and temporary employment contracted. The improvement has been largest for workers in lower-skilled occupations, and this represents a genuinely lower risk of involuntary non-standard work in the labour market, not simply a compositional effect of the workforce becoming older or better educated.

Temporary contracts are the main problem

Still, about half of all temporary employees in the EU are on a fixed-term contract because they could not find a permanent one. That proportion has come down from 63% in 2015, but for most of those in it, temporary work is second-best and not a choice. Involuntary temporary contracts account for almost two-thirds of all involuntary non-standard employment. Involuntary part-time work accounts for most of the rest, mainly among employees who hold permanent contracts.

Wide gaps between countries

Research report

Employment and labour markets

Drivers of involuntary part-time work

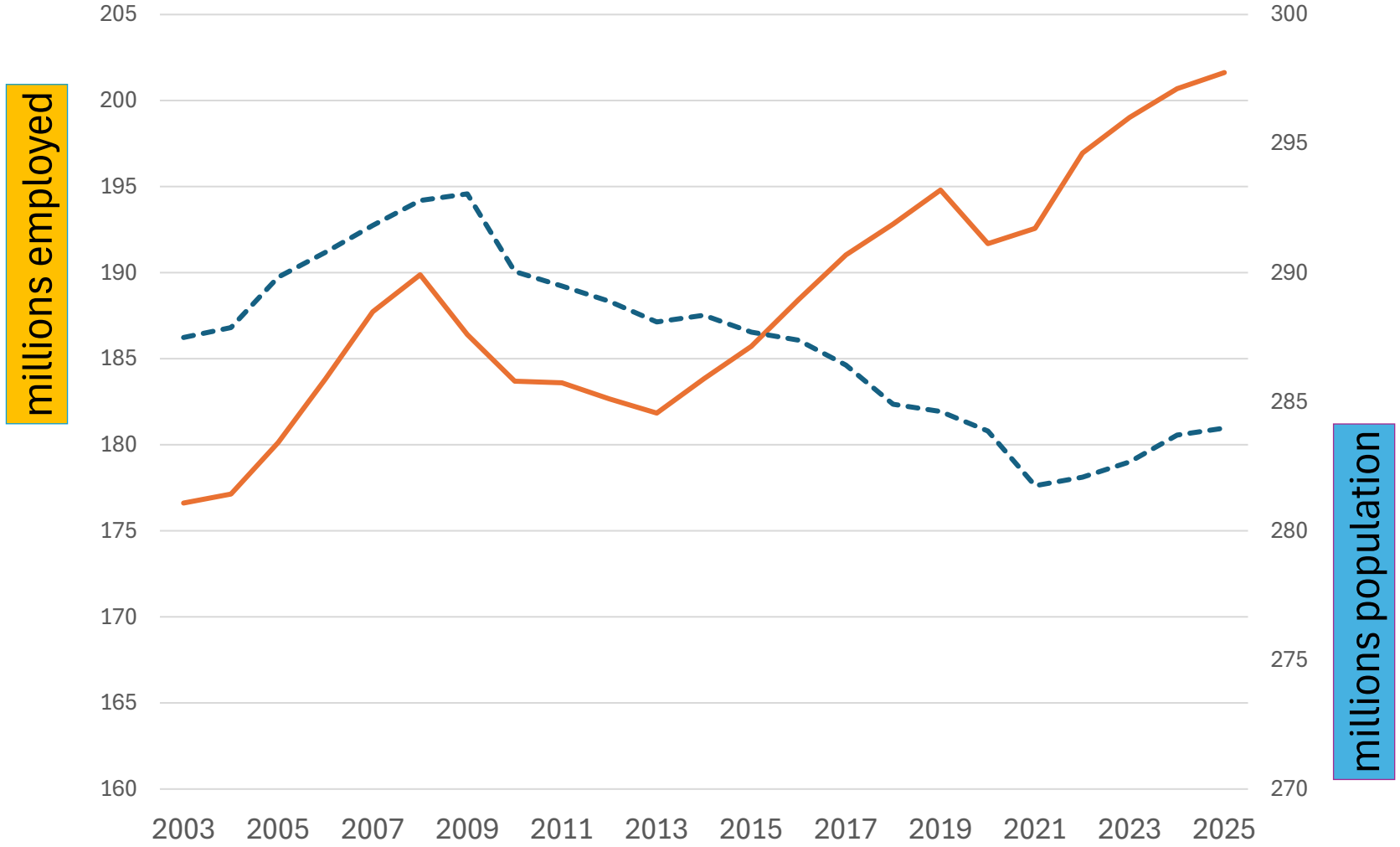
Research report

Employment and labour markets

Subcontracting in platform economy

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EU27 - working age population and employment

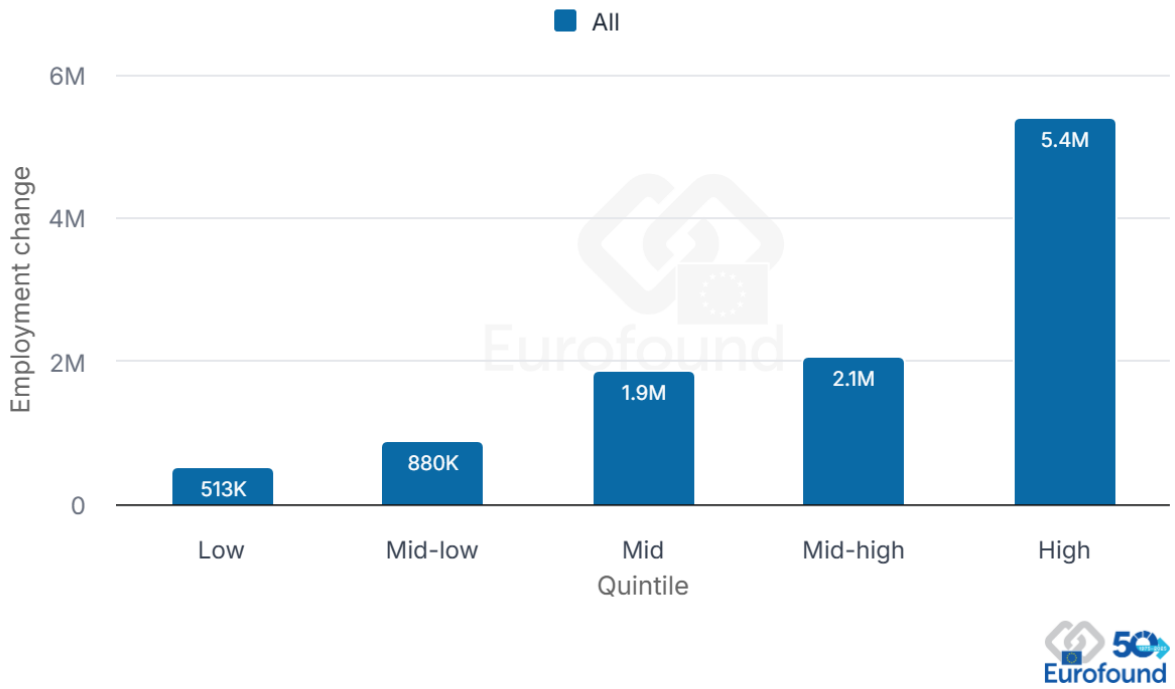


Updated from:
Eurofound (2025), *Structural change in EU labour markets: A generation of employment shifts,* based on EU-LFS

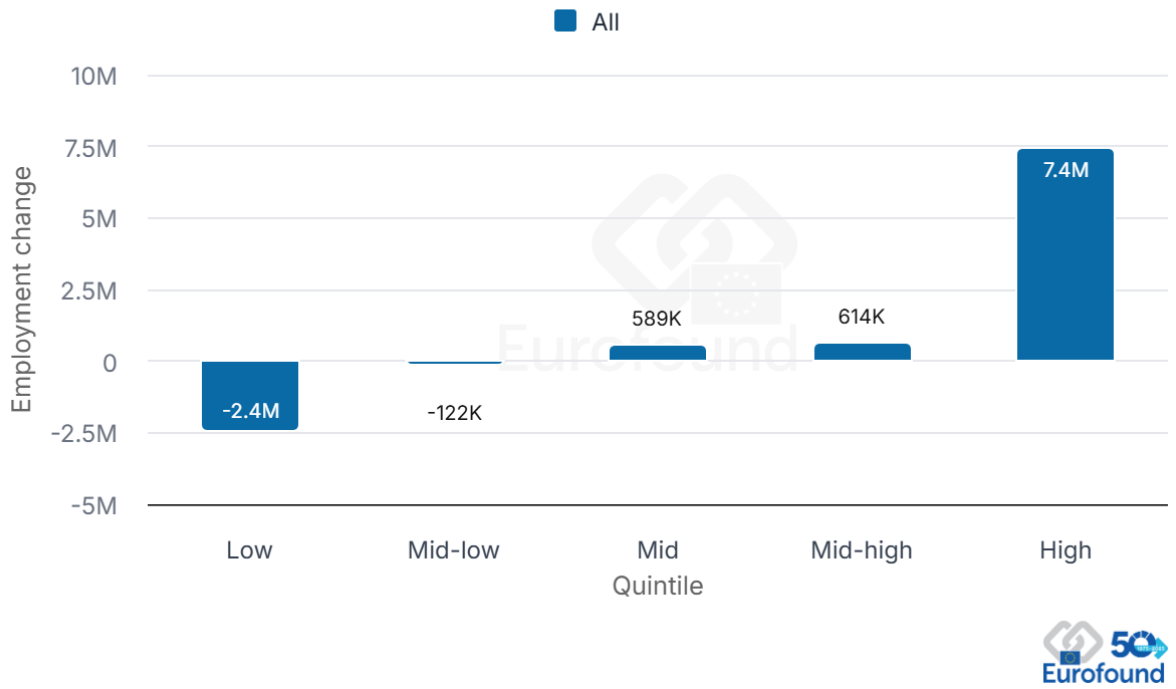
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Upgrading labour markets

Employment change by job-wage quintile in European Union (2011 – 2019)



Employment change by job-wage quintile in European Union (2019 – 2024)

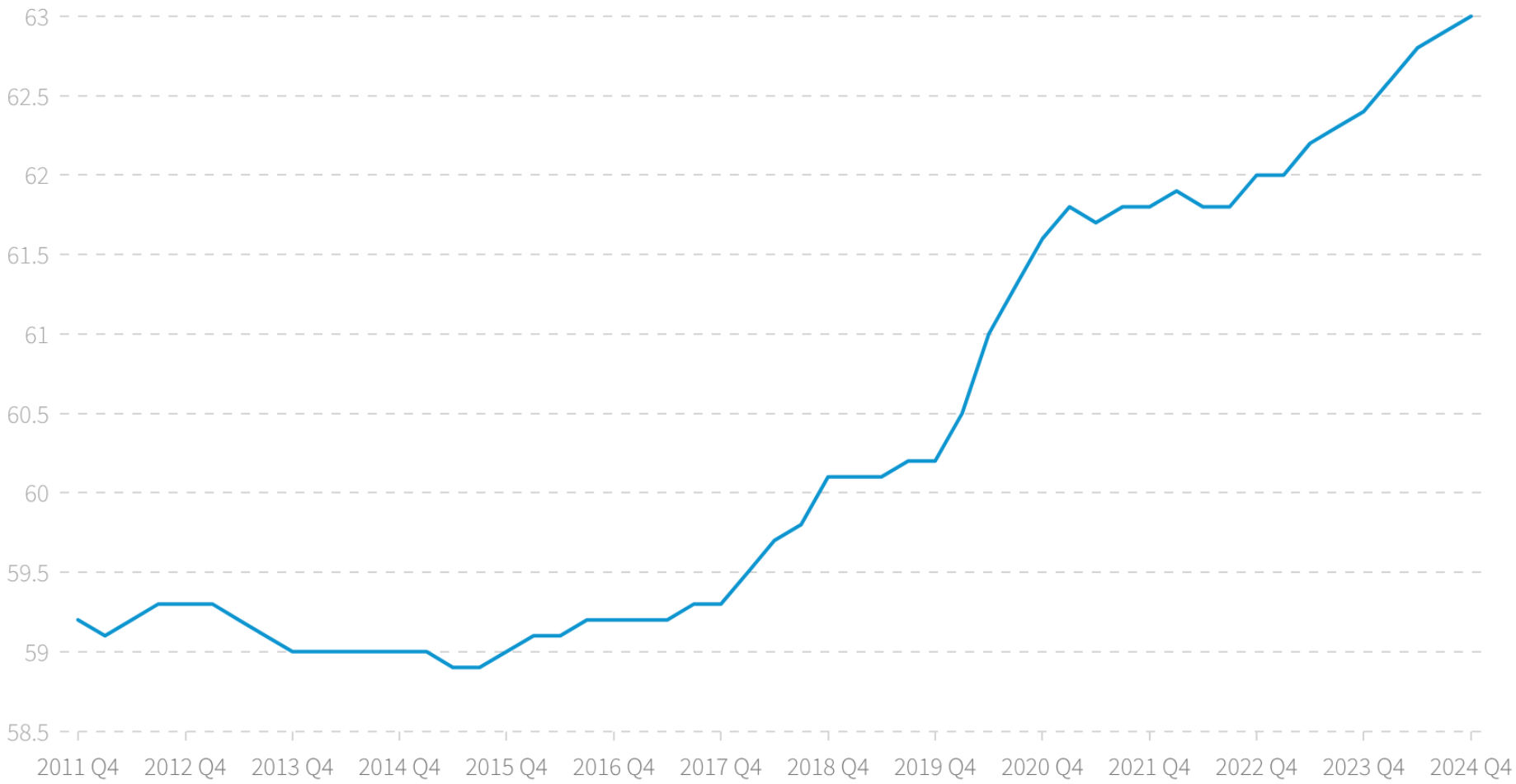


See: *https://www.eurofound.europa.eu/en/surveys-and-data/**european-jobs-monitor***

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Rise in core employment

% of total employment, age 15-64, EU27



Decrease in fixed-term contracts

Long trend in decrease of self-employment

No reduction in part-time work, but more part-timers obtain permanent contracts

Note: Full-time, permanent, dependent employment. 4-quarter moving average

Source: Eurofound (forthcoming) *Non-standard employment in the EU*, based on EU-LFS

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Employment and its growth rates: **top 12 employing jobs**, EU

Job			Employment, millions			CAGR
Occupation	Sector	Quintile	2011	2019	2024	% change per annum
Sales workers	G – wholesale and retail trade	1, 2	11.7	11.6	10.9	– 0.5
Teaching professionals	P – education	5	8.0	8.4	9.5	1.3
Building and related trades workers	F – construction	2, 3	6.2	5.7	5.9	– 0.4
Health professionals	Q – human health and social work activities	5	3.8	4.4	4.9	2.1
Health associate professionals	Q – human health and social work activities	3	4.1	4.7	4.7	1.0
Personal care workers	Q – human health and social work activities	2	4.1	4.0	4.6	0.9
Drivers and mobile plant operators	H – transportation and storage	2	4.1	4.5	4.5	0.7
Personal service workers	I – accommodation and food service activities	1	4.4	5.0	4.3	– 0.1
Metal, machinery and related trades workers	C – manufacturing	3, 4	4.5	4.5	4.2	– 0.5
Market-oriented skilled agricultural workers	A – agriculture, forestry and fishing	1	6.3	4.8	3.8	– 3.8
Stationary plant and machine operators	C – manufacturing	3	4.0	4.0	3.8	– 0.4
ICT professionals	J – information and communication	5	1.2	2.0	3.0	7.3
All jobs			**184.5**	**194.7**	**201.2**	**0.7**

Note: *Where two quintiles are indicated, the job concerned straddles the quintile boundary.*

Source: Eurofound (2025), *Structural change in EU labour markets: A generation of employment shifts,* based on EU-LFS

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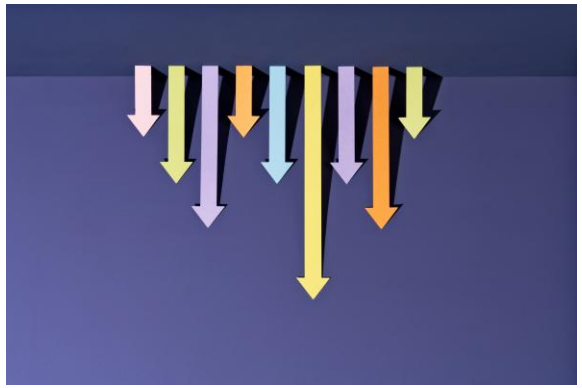
Trends in job quality

European Working conditions survey 2010, 2015, 2024



Improvements:

- Physical environment
- Working time quality
- Skills and discretion
- Being paid properly for the efforts
- Prospects



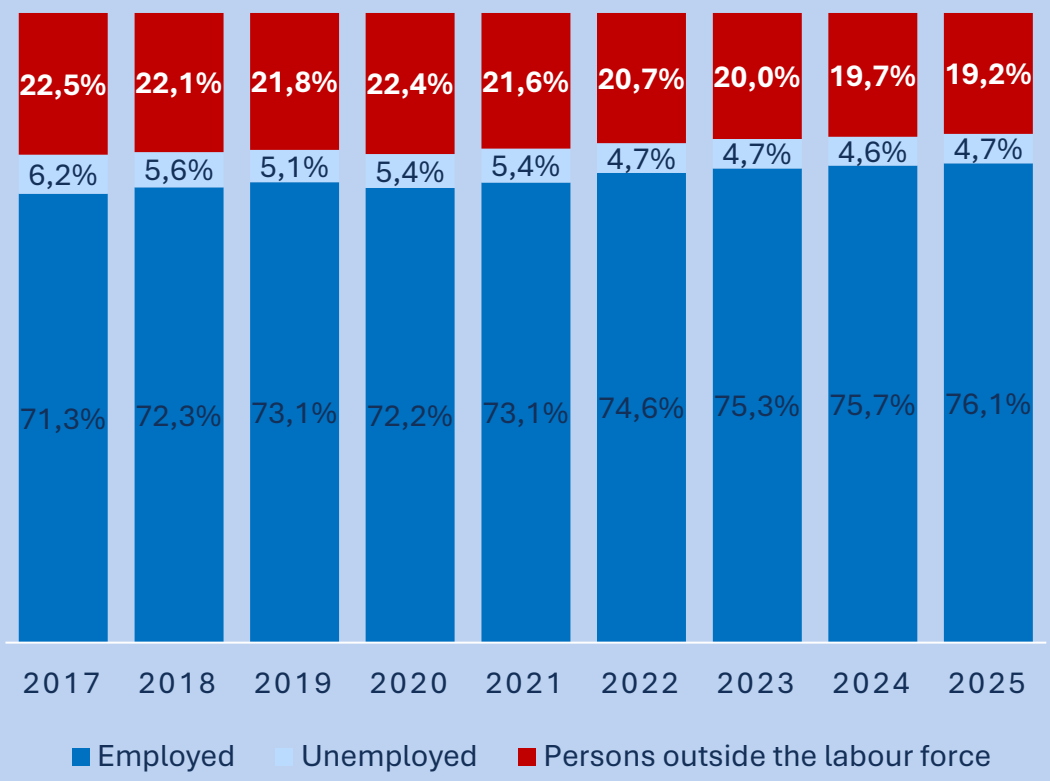
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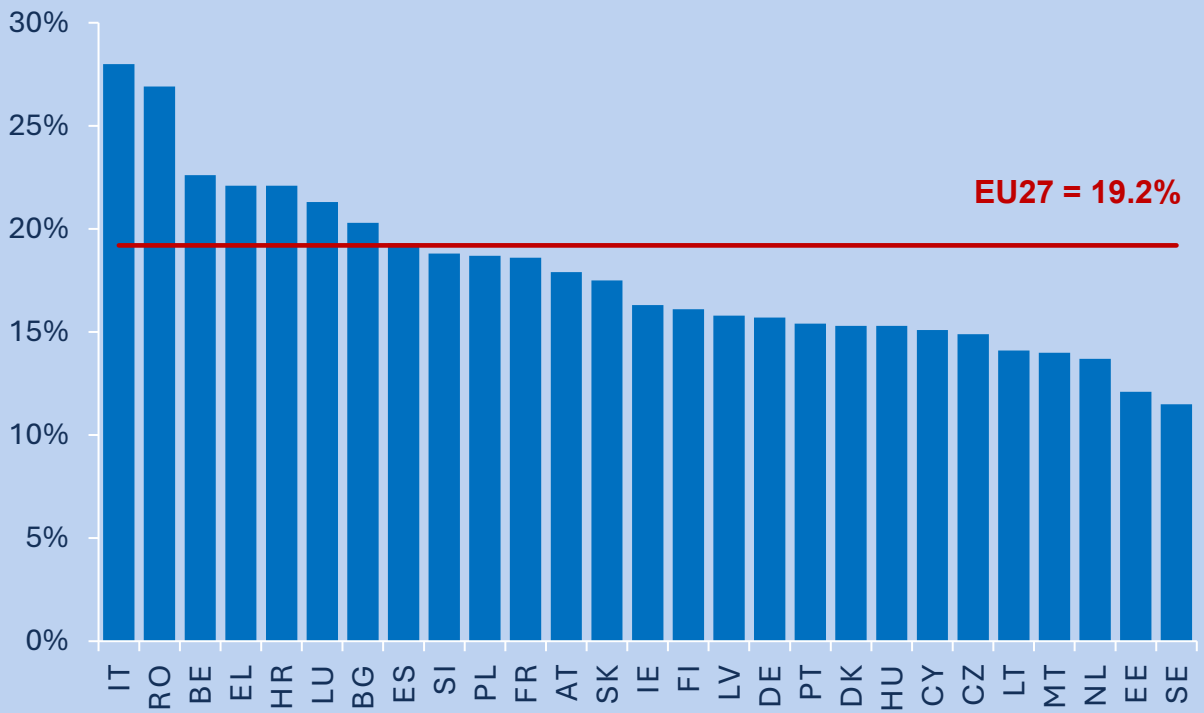
- Social environment (esp. for women)
- Work intensity
- Organisational participation (part of Skills and Discretion)

See: Eurofound (2026) *European Working Conditions Survey 2024: Overview report*

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Inactivity rates

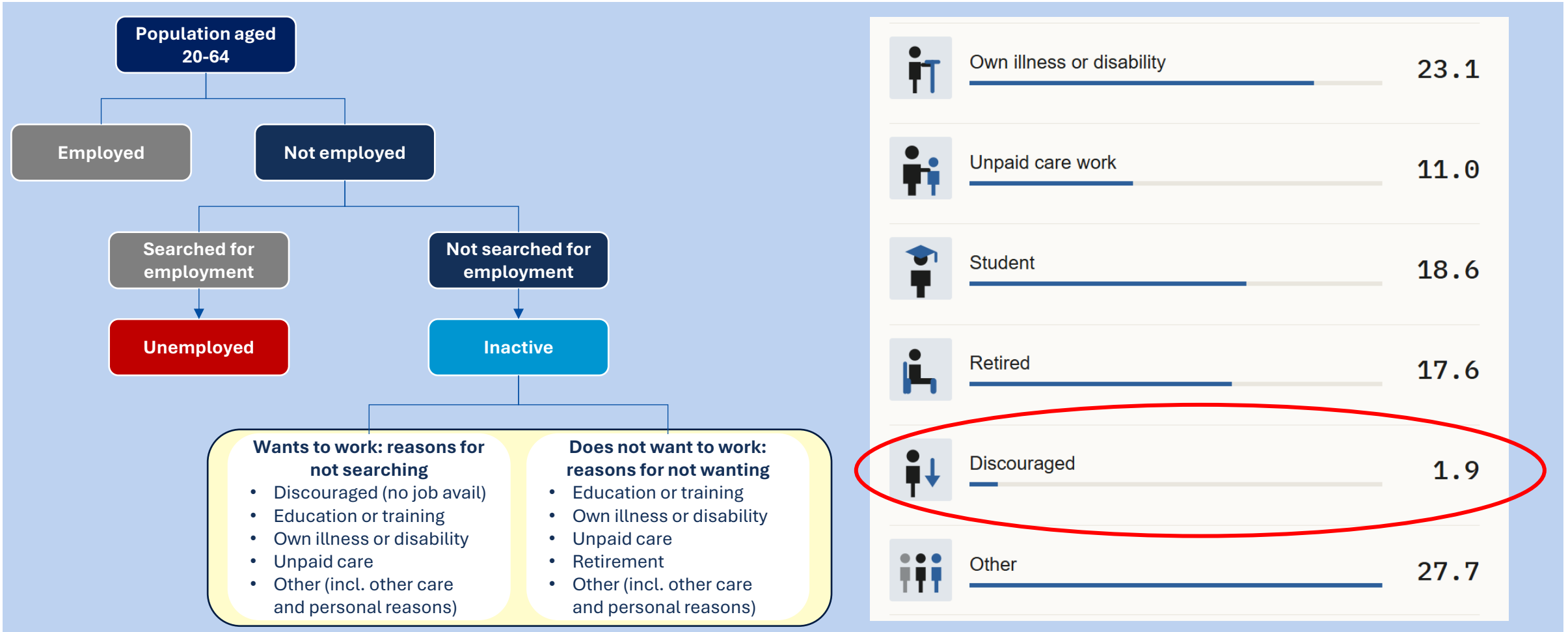




Source: Eurofound project elaboration using Eurostat data [lfsa_pganws]

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Mapping the inactive population



Source: LFS 2024

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Non-standard employment

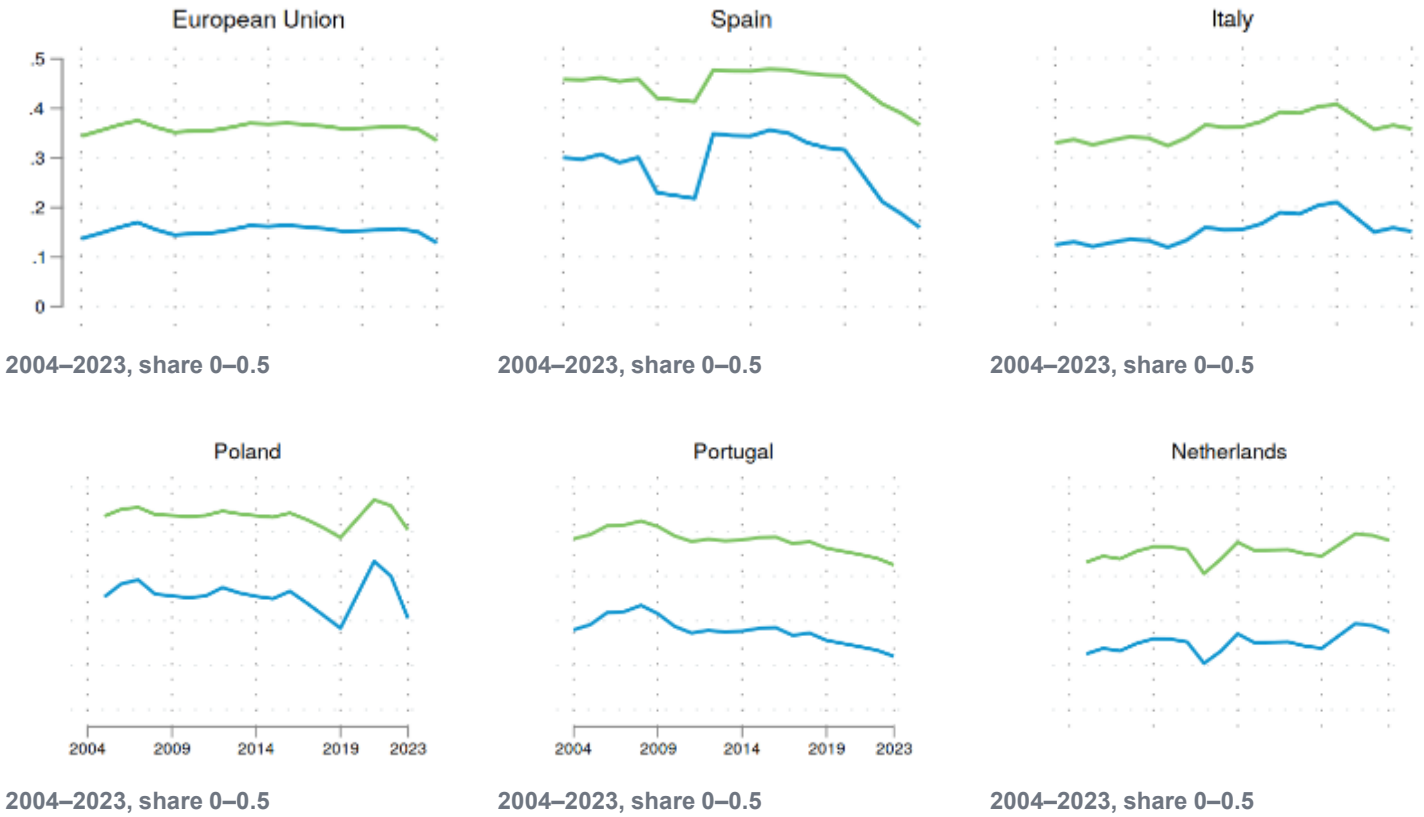
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Temporary employment:

- 2/3 of involuntary non-standard employment is temporary work,
- half of all temporary work is still unwanted

Share of employees on temporary contracts, 2004–2023 (EU-SILC); selected panels

- **2004–2007:** the share rose from 13.7 % to nearly 17 % as employers used flexible contracts in the expansion.
- **2008–2009:** it fell to 14.4 %. Temporary workers were the buffer for lay-offs.
- **2010–2019:** a plateau of 15–16 %, consistent with a stable dual labour market.
- **2023:** 12.9 %, the lowest in the series. Temporary workers took over three quarters of net job losses in 2020; labour shortages then shifted hiring towards permanent contracts.
- **Countries converge slowly.** Spain peaked at 26 % and fell to 15.2 % by 2025 after the 2021 reform; Poland from above 25 % to 11 %. The gap between highest and lowest country narrowed from 18 to about 10 points.



Blue: temporary employment share. **Green:** standard deviation across the workforce. Country panels share the EU panel's vertical scale.

Source: Eurofound calculations based on EU-SILC.

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Temporary employment: Stepping stone or dead end?

- Transitions: one in five temporary employees move into a permanent job (per year)
- Contract improvements are weaker where labour markets are segmented

Yearly labour market transition rates in the EU (%), by starting status and group

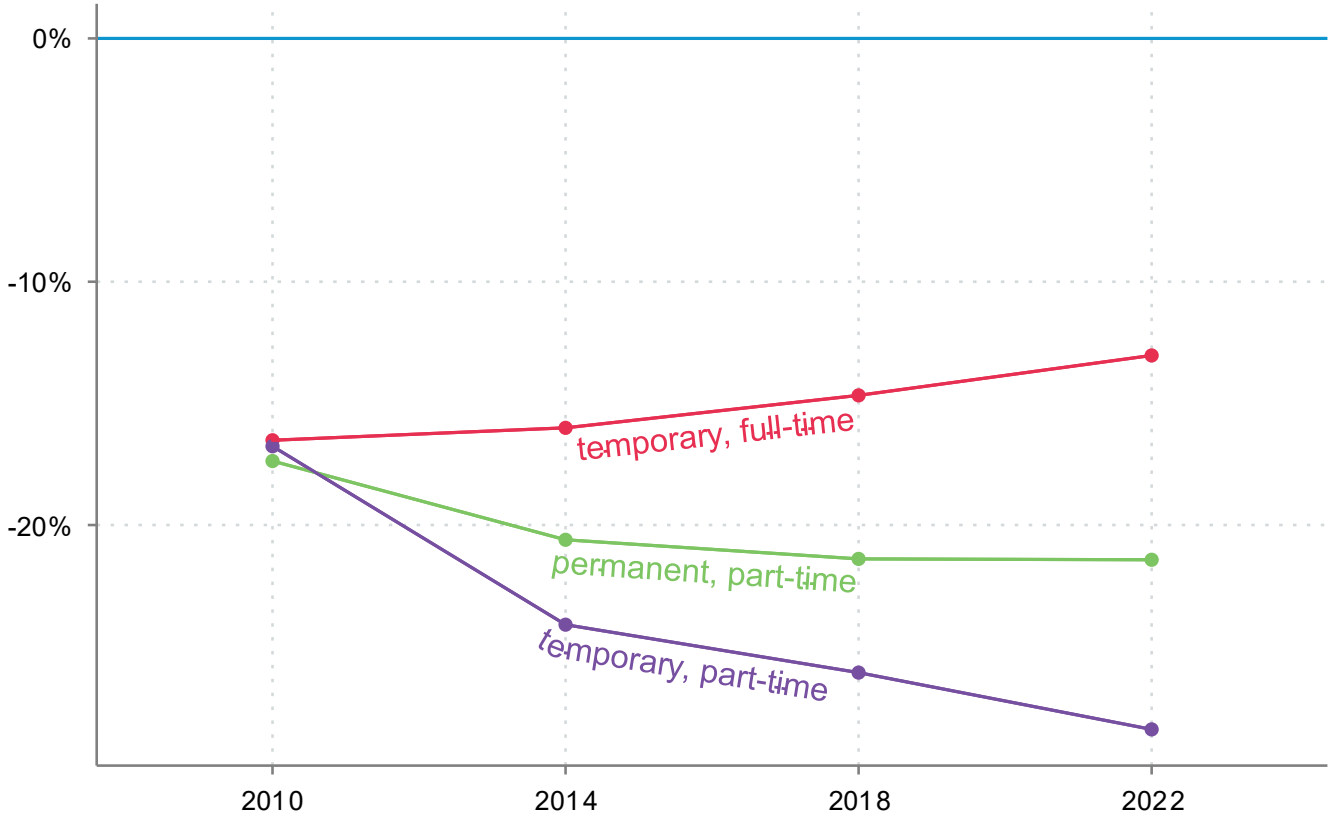


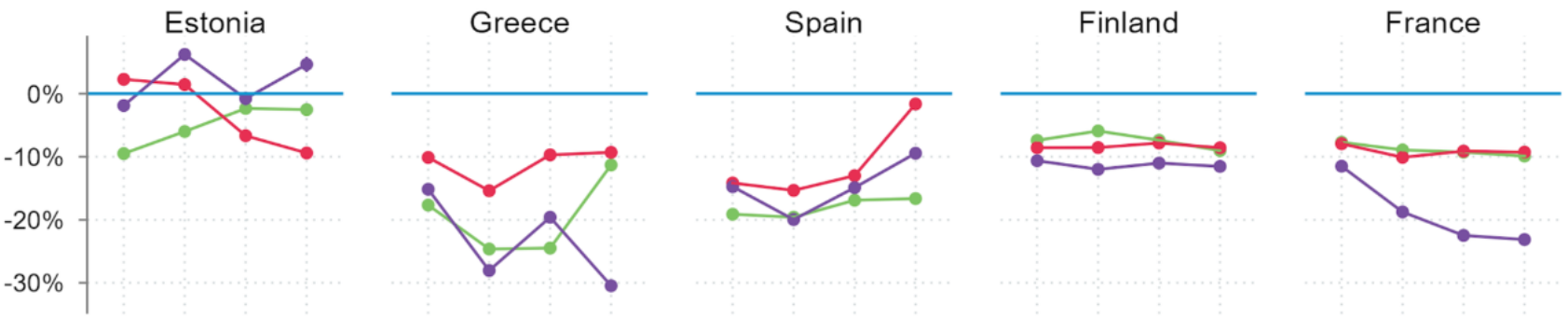
- **From temporary employment (top left):** 63.4 % are still temporary a year later, 21.5 % have moved to a permanent job, 10.7 % are unemployed and 4.5 % have left the labour force.
- **Mobility is unequal.** Workers with low education move up least (16.0 %) and fall into unemployment most (15.3 %); tertiary graduates move up most (25.3 %) with only 7.3 % unemployed. The young move up less (18.8 %) than prime-age workers (22.6 %).
- **Temporary jobs are the main re-entry door (bottom left).** Of the unemployed, 14.4 % move into a temporary job within a year, against 11.3 % into a permanent one; for young unemployed people the temporary route reaches 19.7 %.
- **Women leaving temporary jobs are more likely than men to leave the labour force altogether,** 5.5 % against 3.3 %.

Source: Eurofound calculations based on the EU-SILC longitudinal panel 2004–2023.

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Wage gaps relative to standard employment, %, EU





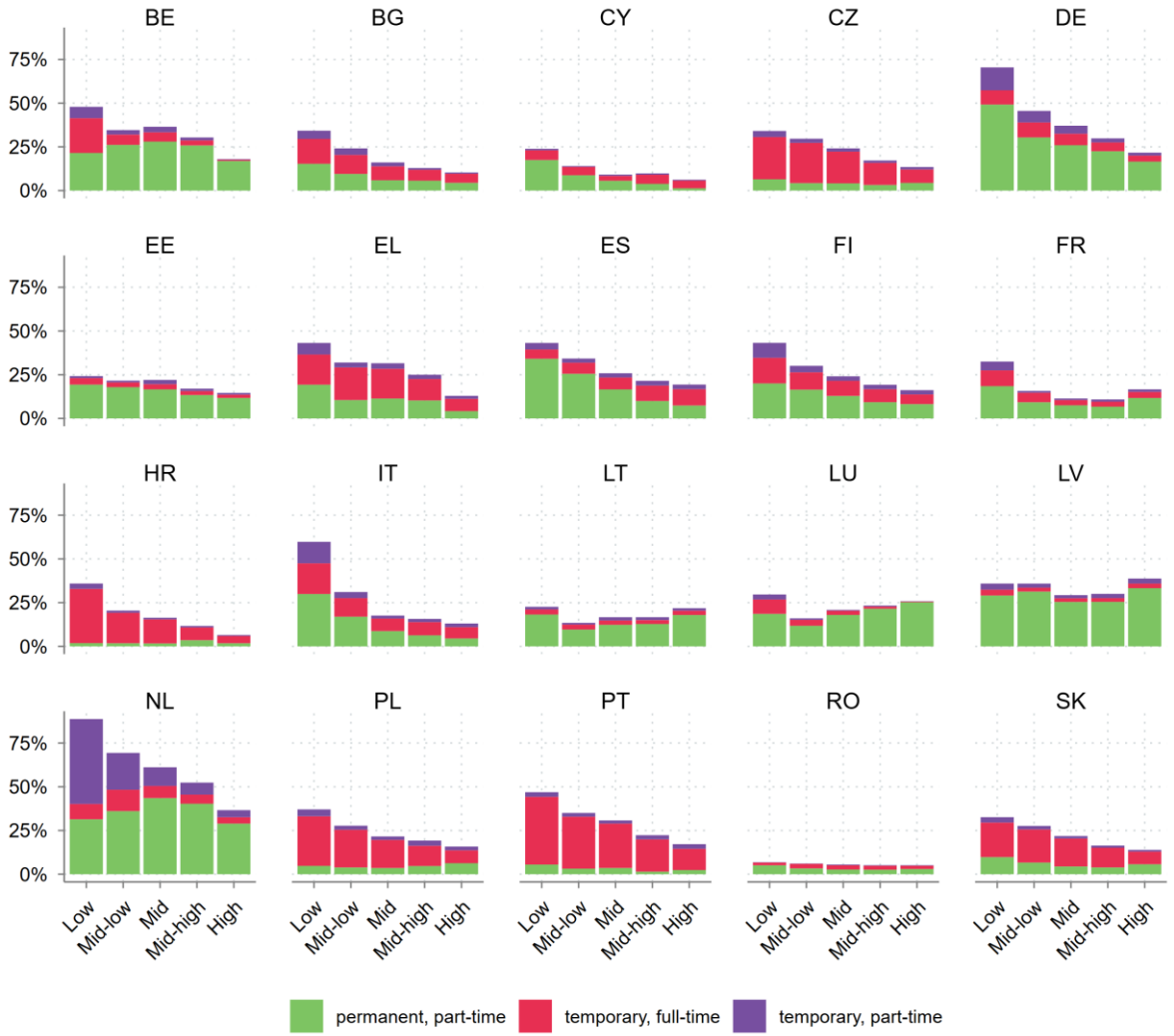
Pay disadvantage is shifting towards part-time forms of work, held overwhelmingly by women:

43.5 % of female employees are in non-standard employment, vs 23.7 % of men.

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Non-standard work and low pay overlap most where such contracts are most widespread

Share of employees in non-standard employment by hourly wage quintile, 2022 (%), Q1 lowest to Q5 highest

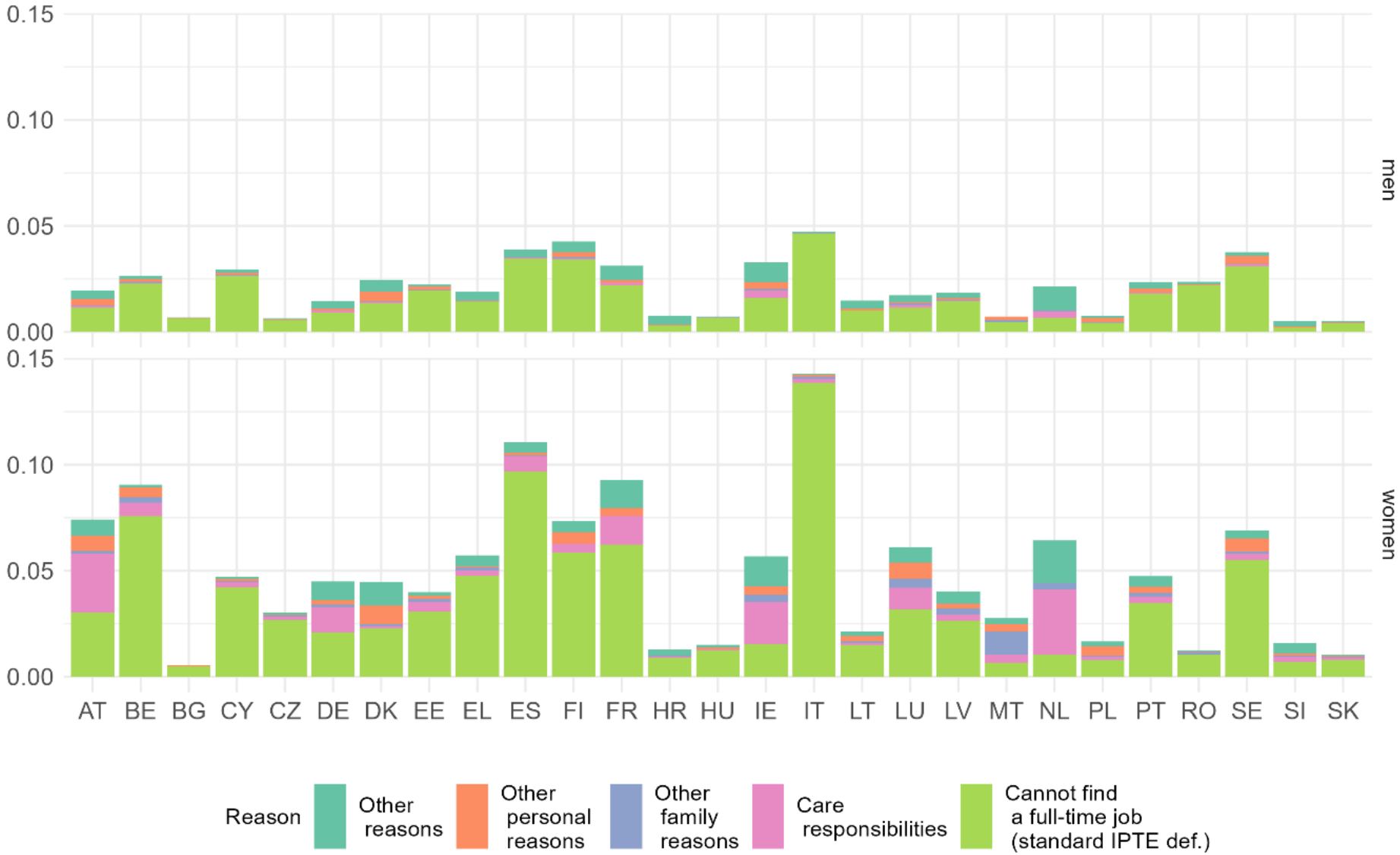


- **Low earners.** Among the lowest-paid fifth of employees, 88.7 % in the Netherlands and about 70 % in Germany hold non-standard contracts. Temporary and especially temporary part-time contracts cluster among low earners; in the Netherlands nearly half of the lowest earners are temporary part-time.
- **Permanent contract, part-time work can pay well.** It accounts for a third of employment among the highest paid in Latvia and over a quarter in the Netherlands and Luxembourg.
- **Country patterns differ.** Germany and the Netherlands show persistently larger penalties than the EU average; Germany's temporary part-time gap has stayed at 27–33 %. France's nearly tripled, from –11.5 % to –23.1 %. Estonia, Latvia, Lithuania and Romania show premiums rather than penalties for several forms.
- **In the Baltic states and Romania** non-standard employment is equally common, or equally rare, across all income groups.

Source: Eurofound estimates based on SES 2022, 20 Member States (Chapter 4, Figures 24 and 26).

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Involuntary part-time work, % of total employment by gender and country, 2024



Source: Eurofound (forthcoming) *Drivers of involuntary part-time employment in the EU*, based on EU-LFS
Note: Preliminary findings

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Employment opportunities:

Some types of voluntary non-standard employment can offer:

Employment entry and re-entry routes,

LM participation for people with care responsibilities,

Autonomy.

EPSR, principle 5: Secure and adaptable employment

Workers have the right to fair treatment, safe **transitions** between jobs, and protection from insecure or abusive working conditions, regardless of **contract type**.

Disadvantages:

Temporary part-time work and involuntary part-time work on permanent contracts can compound the disadvantages.

Group differences: Women, young workers, workers with low education, low-skilled occupations are ones where disadvantages intersect.

Vocational pathways and care responsibilities affect whether temporary work is a bridge or a trap.

Inactivity, being discouraged and furthest from labour market may become harder to change -

that's why addressing the overlapping disadvantages matters.

Consider twin focus: creating jobs + the role of social economy in facilitating employment andt participation/training!

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Thank you

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